Chapter 2

Forming Your Kanban Team

To successfully implement kanban scheduling, use a team. The team will ensure buy-in from the people that must operate the kanban while guaranteeing that unique aspects of the process are being considered.

This team needs to be cross-functional and contain representation from all the stakeholders. Key team members include:

- Production management/supervision
- Materials management
- Material handling/warehouse
- Operators (last but not least)

Others to consider for membership include:

- Human relations
- Engineering
- Maintenance
- Sales/Customer service
- Downstream customer(s)
- Trainees for future kanban projects

Make the decision on what additional members to add, based on their ability to contribute to the process. In the question of whether to include external customers on the team, consider:

- Their potential contribution
- The opportunity to enhance the supply chain

- The potential to develop strategic alliances
- The current state of your relationship

In conjunction with forming the team, appoint a project leader to oversee execution of the project. Make sure this person understands the mission and the level of authority. To get the ball rolling, fill in the list below with the proposed members of the team:

_____*Project Leader*

_____

_____

_____

_____

_____

_____

_____

Kick off the team by holding a team meeting to assign roles and set up team rules. The project leader is not the only person who should have team responsibilities. Figures WB 2-1 through WB 2-6 show a suggested agenda, group rules form, assigned roles form, and accompanying discussion of each form. Figure WB 2-7 contains a suggested action item tracking form.

Figure WB 2-1

Initial Team Meeting Agenda

- Introductions
- Team Purpose
  - Objective
  - Target Process
  - Time Line
- Team Expectations and Concerns
- Develop Group Rules
- Assign Roles

- Develop Team Schedule

- Review Action Items

Figure WB 2-2

Initial Team Meeting Agenda: Annotated

- Introductions
- Team Purpose
  - Objective
  - Target Process
  - Time Line
- Team Expectations and Concerns
- Develop Group Rules
- Assign Roles

- List Required outcomes

- Make list of expectation and concerns
- Consider as items to

See Figure WB 2-3

See Figure WB 2-5

- Develop Team Schedule

Consider regular meeting times, kanban training, implementation date, and preparation work

- Review Action Items

Use the Figure WB 2-7 Action Item

Figure WB 2-3

Group Rules

-
-
-
-

Figure WB 2-4

Group Rules: Discussion

Using the Figure WB 2-3 Group Rules form, list all rules for the team's operation. The project leader should make sure that everyone understands that these will be the "Rules of the Road" and will be followed by all members. The rules must be developed and accepted by the group.

Use standard rules, such as Zenger-Miller or existing company meeting rules, if applicable. Examples of potential rules include:

- Be on time for time for all meetings
    - Anyone who plans to be absent will notify the project leader in advance or send a substitute
    - Doors will be locked after the start of the meeting
- Be courteous
    - No personal attacks
    - Focus on the issue
    - Everyone gets a chance to speak

- Decision making will occur

_____

_____

_____.

- Minutes and action items will be distributed by

  _____

_____.

- All action item statuses will be updated before each meeting

Figure WB 2-5

Assigned Roles

- Scribe:
- Budget Manager:
- Meeting Facilitator:
-
-

Figure WB 2-6

Assigned Roles Discussion

The roles listed in Figure WB 2-5 are intended for members of the group other than the project leader. Tailor the assigned roles to your organization's structure and culture. Also remember:

- These roles can be fixed or rotated
- The decision of whether or not to have a meeting facilitator will be based on your organizational culture

Figure WB 2-7

Action Items

Date:

Project:

Item #:	Action:	Responsibility	ECD	Comments	Date Closed

Once the team members have established their roles and rules, they need to develop a schedule and a budget. Ideally, the implementation timeframe should not be greater than one month. Figures WB 2-8 and 2-9 show an example timeline and a blank action form for the team to create its own implementation timeline.

Do not underestimate the importance of taking the time to form and train the implementation team. The time invested in these preparatory steps will be more than repaid by the quality of the design implemented by the team.

Use the recommended forms to create a team charter and performance agreement. Consider having each member of the team sign the forms to show their concurrence and acceptance.

Figure WB 2-8

Action Plan: Kanban Implementation on Line A

Start Date: Today

Champion: Joe Smith, Plant Manager

Action Steps	Who:	Days	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	% Complete 20	40	60	80	100
Create Team		5																																			
Appoint Project Leader																																					
Select Team Members																																					
Hold First Team Meeting																																					
Gather Initial Data																																					
Training and Design		5																																			
Implementation and Training		10																																			
Start-Up		2																																			

Figure WB 2-9

Action Plan: _____

Start Date: _____ **Champion:** _____

Action Steps	Who:	Days	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	% Complete 20	40	60	80	100